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Washington LABOR MARKET

Washington State
Employment Security

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In cooperation with the
Employment and Training
Administration
U.S. Department of Labor

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Highlights

Back To The Future

Reopening of schools overlaid atop a steady economy pushed Washington's nonfarm employment up stongly in September. Total wage and salary jobs in the state rose 24,200 over the month and stood 100,000 above a year earlier – the largest year-to-year increase for the month since 1979. Much of the August-to- September payroll hike represented typical seasonal recall of workers in public and private education. The economy, however, continued its momentum, driving nonagricultural employment higher on a seasonally adjusted basis for the 83rd consecutive month. October will mark seven years of economic expansion – the longest in postwar history.

Statewide unemployment, meanwhile, dropped two tenths of a percentage point over the month to 5.2 percent of the labor force. Typically, September and October mark the low points in terms of overall

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joblessness as much of the economic base moves to seasonal peaks. Highs in construction, food processing, services, and government more than compensate for fall cutbacks in tourism and recreation. The state's jobless rate in September essentially matched the national average of 5.1 percent and stood half a percentage point below a year before

RESIDENT CIVILIAN LABOR FORCE, EMPLOYMENT AND UNEMPLOYMENT IN WASHINGTON STATE

	Sep 1989 (prelim.)	Aug 1989 (revised)	Sep 1988 (revised)
Resident Civilian Labor Force	2,382,300	2,425,800	2,312,000
Employment	2,257,400	2,294,300	2,180,300
Unemployment	124,900	131,500	131,700
Unemployment Rate	5.2%	5.4%	5.7%
National Unemployment Rate	5.1%	5.1%	5.2%

Data in this table are not seasonally adjusted.
Official U.S. Department of Labor, Bureau of Labor Statistics data.

LABOR FORCE SUPPLY AND DEMAND

Tightness of the labor market is becoming an increasingly pressing issue in many key industries. Particularly acute is the shortage of skilled workers in the Seattle PMSA where 60 percent of the state's job growth has centered. Boeing's decision to temporarily import 600 Lockheed workers earlier this year was an extreme reaction to an inadequate supply of skilled machinists. On a broader plane, fully a third of the respondents to a recent statewide small business survey said they could not find skilled workers in their respective labor areas, and general help-wanted advertising in the *Seattle Times* was up 25 percent September-to-September.

Washington's unemployment rate *dropped below 6 percent* on a seasonally adjusted beginning last October for the *first time in 20 years*. Six percent in the present environment must logically be considered close to a full employment economy. Some of the pressure in Washington has been relieved through inmigration.

However, average worker earnings in manufacturing are being pushed higher in 1989 after no change in 1987-88, and the lengthy machinists' strike against Boeing—the largest industrial employer in the state—resulted in general wage increases plus bonuses, cost-of-living adjustments, and reductions in mandatory overtime.

CONTRARY TOTAL EMPLOYMENT

Resident total employment *dropped* in September by an amount nearly equal to the increase reported in nonfarm employment. The apparent dichotomy is not unusual for this time of year when seasonal self employed in such activities as lawn care, fairs, and concessions exit the labor force. This time around, however, the order of magnitude was significant.

Part of the explanation rests with reporting differences between the two series. Labor force and total employment are derived from a household survey; nonfarm payroll employment from employer records. The one measures employed persons; the other measures number of jobs. Under normal circumstances, the two are basically comparable. But a large increase in multiple jobholders is a factor causing the series to diverge of late. Differential treatment causes employment in the payroll series to rise more than that of the accompanying household survey. In addition, the sample size of the household survey is relatively small and subject to greater vacillations over time than the larger nonfarm payroll estimates.

INDUSTRY DEVELOPMENTS

Education was the driving force for employment in September, accounting for 29,000 additional jobs over August. Recall of 24,400 noncertified workers at public schools including bus drivers, cafeteria workers, teachers aides, and other support staff represented the major boost. Reopening of private schools and universities added another 4,600. October will witness a further buildup to full staffing levels for the 1989-90

academic year. Meanwhile, the rest of the month-to-month fluctuations in September were largely confined to food processing, services, and trade.

A Matter of Offset

Aside from fairly typical seasonal expansion in food processing, statewide manufacturing employment in September was a study in offsets. Food processing, sparked by a good crop year, mounted by 1,100 workers over the month to a seasonal peak of 38,700. Vegetables and soft fruit harvests typically drive processing activity up sharply in September followed by a pullback through the balance of the year. Other notable gains included 300 each in aerospace and other transporation equipment, and 200 each in electrical machinery and printing and publishing. Although significant, the September aerospace addition paled in comparison to an average 1,000 a month increase since the beginning of 1989 and 700 monthly over the past five years.

Countering the gain were some fairly modest but broad-based declines of 100 each in paper, primary metals, and stone, clay, and glass. In addition, a very atypical retrenchment of 400 took place in lumber and wood products. Normal month-to-month pattern would dictate no change. August employment, particularly for logging, was probably inflated by unusually mild weather this year which kept the forests open throughout the summer months. Another factor was higher than seasonal activity early in the year to build inventory against forced timber restraints coming out of the "spotted owl" controversy. September's employment likely reflected return to a more normalized market situation.

Services Build Seasonally

Roughly 80 percent of the 5,800 payroll increase in services represented return-to-work at private schools and colleges throughout the state. Returning students also caused day care centers to expand seasonally in September as older children shifted from households to classrooms. As the summer drew to a close, tourist-related services at hotels, outdoor recreational facilities, and amusement parks also scaled back.

The two-week run of the Western Washington State Fair, however, typically collides with that timing and provides very significant offset. The fair ranks as the

eighth largest in the nation with a direct job total of 1,400 plus an estimated 5,000 more at concessions, eateries, and amusements spread throughout the fairgrounds and along the immediate perimeter areas. Attendance this year was up 20 percent to 1.36 million.

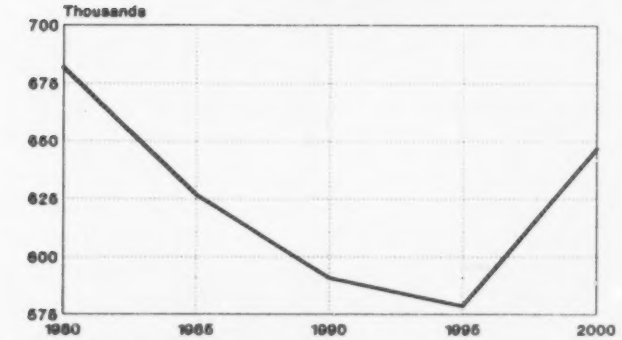
Future Shock Is Here

Running counter to normal trend, retail trade dropped by 5,200 workers in September. At no time over the past 25 years has retailing not increased fractionally during the month with back-to-school shopping and other seasonal impacts. The drop this year centered specifically in restaurants and fast food outlets as summer youth returned to school. The labor market was simply unable to provide replacements as the youth cohorts of the population have proceeded to decline.

It is estimated that 16-to-24 year olds coming out of the birth dearth of the 1970's are dropping 8 percent over the ten years to 1995. Total population is forecast to rise 15 percent, and the number of 35-to-54 year olds is projected to increase nearly 50 percent. But the young, entry-level worker is becoming a scarce commodity. Some shifts are occurring within business to tap older, disabled, or disadvantaged workers to make up the difference. Hourly wage rates in various service and trade sectors are rising. Nonetheless, the impact of youth shortages in the Washington labor market finally became a reality with the September retail trade figures.

Changing demographics over the next ten years offer the state both a challenge and an opportunity. The combination of lower labor force growth and higher skill requirements mandates improved education and training programs aimed at workers traditionally left out of the mainstream in order to address what amounts to a potential serious skills gap. Governor Gardner is proposing a two-year program consisting of a comprehensive study of the state's vocational training and adult education system followed by a series of training pilot projects. The projects will use innovative techniques to expand apprenticeship programs, improve access and flexibility, and induce high-risk inner city youth into career path training programs. The fusion of business and government holds the key.

Population Projections
16-24 Year Olds in Washington State
1980-2000



Source: Office of Financial Management

Services Set The Year-To-Year Pace

Total nonagricultural wage and salary employment showed a 100,000 year-to-year increase in September – the largest for the month since 1978-79. Roughly half the gain centered in trade and services, the two sectors which have led the economy throughout the expansion. Over the past seven years, trade and services payrolls have expanded by nearly 40,000 annually, moving from 45 to 48 percent of the total economy. Much of the growth centers in business services, specifically data processing and temporary help agencies, and health services at treatment centers and clinics other than hospitals.

Meanwhile, manufacturing continues to generate higher than proportionate growth. September-to-September payrolls in basic manufacturing were up 21,900, or 6 percent, in contrast to less than 1 percent nationally. Admittedly, aerospace has been the principal driving force locally, accounting for roughly 60 percent of the total year-to-year increase. However, significant expansion has also occurred in machinery (+ 2,000), food processing (+ 1,600), and lumber and wood products (+ 1,100).

AREA TRENDS

Driven Down By Apples

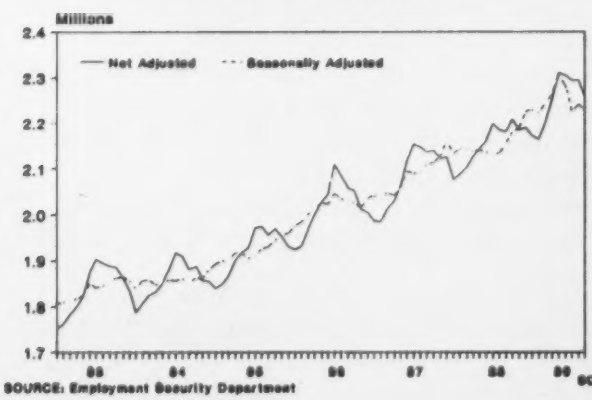
Seasonal heightening in food processing and beginning of the apple harvest served to pull down unemployment levels throughout most of Eastern Washington in September. On average, the jobless rate for the eastern half

of the state dropped over the month by one-and-a-half percentage points to 6.0 percent of the labor force. Principal beneficiaries were Chelan, Douglas, and Okanogan counties. Each witnessed a decline of approximately five percentage points, to a seasonal low between 6 and 7 percent. Within the metropolitan areas, both Yakima County and the Franklin County area of the Tri-Cities were similarly affected.

Urban Holds Firm

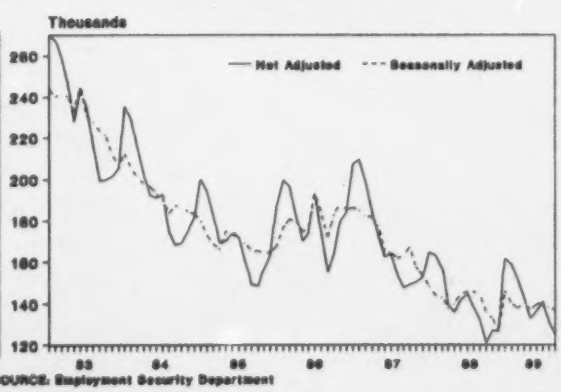
Washington's principal urban centers, meanwhile, showed basically no change in overall unemployment rates between August and September. The average for all areas held at 5.0 percent. Seattle-Everett continued to hold at the low end of the range with 4.3 percent. Tacoma and Spokane stood at 5.6 percent and 5.3 percent, respectively. Only Yakima measured significantly above the statewide average, but its 7.1 percent rate for the month matched that of September in both 1987 and 1988, and likely represents the low point for the year.

STATE TOTAL RESIDENT EMPLOYMENT
JAN 1983 - SEP 1989



SOURCE: Employment Security Department

STATE TOTAL RESIDENT UNEMPLOYMENT
JAN 1983 - SEP 1989



SOURCE: Employment Security Department

INDUSTRY NOTES

Boeing Back

Boeing machinists returned to work on November 22 after 48 days on strike – the longest walkout against the aerospace giant since the 45 day strike in 1977. The 43,000 workers, representing 2 percent of Washington's total nonfarm workforce, received general wage increases in excess of cost of living adjustments amounting to 4 percent in 1990 and 3 percent in each of the following two years. In addition, mandatory overtime was cut and lump sum bonus payments were pegged at 10 percent, 5 percent, and 4 percent respectively, over the three year contract.

Production during the strike was at a near standstill with only 24 planes delivered; return to full production will take weeks. The State Forecast Council estimates the strike cost the state $175 to $200 million in lost personal income. Indirect impacts on the Seattle area economy, however, were minimal: Boeing suppliers reported some delivery cutbacks during the period, but settlement in late November means Seattle area merchants should go through the critical Christmas buying season relatively unscathed.

Population Pushes Harder

Migration into Washington State is running nearly double previous estimates, according to the Office of Financial Management. Rather than 45,000, net migration for the year ending next April is now figured at 86,000 – up from 58,000 last year. The earnings impact of these workers is estimated at $170 million in 1990 and $450 million in 1991. With a slowing economy, net migration is forecast to total 55,000 next year and 30,000 the year after.

Washington Exports Grow Faster Than The National Average

One cause: Washington is shipping its product out faster than the nation as a whole. Washington-based exports grew 31 percent last year to a record $14 billion – 10 percent faster than the nation's exports. Collaterally, the value of Washington-consumed imports totalled $6.5 billion, giving the state a $7.4 billion trade surplus. The state ranked first in exports per capita in 1988, shipping $3,043 for every resident. One in every five jobs statewide is figured to be linked directly or indirectly to foreign trade.

In agriculture, strong showing of wheat and apples last year pushed the state's farm exports up 47 percent to $1.33 billion. The national increase was 30 percent. Exports were the primary market for wheat, dry peas, lentils, mint oil, and hops. About a third of Washington's total farm income is generated from foreign trade.

NATIONAL INDICATORS

Go-Go GNP

Third quarter growth of Gross National Product – the nation's total output of all goods and services – came in at an inflation-adjusted 2.5 percent annual clip, the same as recorded in the second quarter. The preliminary estimate presented a mixed picture of the economy; surprising strength in consumer spending, unexpected weakness in trade, and an easing in overall inflation. Driven largely by auto dealer incentives, consumer spending jumped a sharp 5.8 percent in the July-September period. Lower oil prices, meanwhile, pulled the GNP price deflator down from 5.0 percent in the second quarter to 2.9 percent. Collectively, the rate of expansion over the past two quarters was the lowest since the fourth quarter of 1986 and appears consistent with a "soft landing" target being orchestrated by the Federal Reserve.

Manufacturing Continues To Falter

Against the generally upbeat GNP figures, evidence of slowing continues to mount. Orders for manufactured goods held steady in September only on the strength of a large boost in military purchasing. The Commerce Department reported that orders for both durable and nondurable goods totalled a seasonally adjusted $236.7 billion for the month. Military orders increased 60 percent from August $12.7 billion – the second biggest jump in military purchasing in history. Without that factor, orders would have dropped 2 percent.

Along the same vein, manufacturing productivity rose an anemic 1.4 percent in the third quarter, off dramatically from the 3.7 percent annual rate in the second quarter. This was the smallest productivity increase since the fourth quarter of 1987 and underscores the fact that manufacturing is indeed bearing the brunt of the national economic slowdown.

Key Barometers

New housing starts fell sharply by 5.2 percent in September to an adjusted 1.26 million unit annual rate – the lowest since the depths of the 1982 recession. At the same time, sales of new homes nationwide dropped 14 percent. Analysts saw the September data as largely an aberration following an unsustainable blip in July. Mortgage interest rates declined in July before edging higher in August and September.

Meanwhile,the government's chief economic forecasting gauge registered only a modest increase in September. The Commerce Department's Index of Leading Indicators – designed to foretell economic activity six to nine months hence – inched up 0.2 percent following a 0.5 percent rise in August. Consumer expectations remained positive; most of the negative drag centered in manufacturing. With consumer spending accounting for fully two-thirds of GNP, continued strength in that key sector likely points to futher modest growth of the economy well into 1990.

CONSUMER PRICE INDEX

(All Items, Urban Consumers, 1982-1984=100)

	INDEXES			% CHANGE FROM	
	Sep 89	Aug 89	Sep 88	Aug 89	Sep 88
U.S. AVG	125.0	124.6	119.8	0.3%	4.3%
	Jan-Jun	Jul-Dec	Jan-Jun	2nd Half	1st Half
SEATTLE*	1989	1988	1988	1988	1988
	116.7	113.8	111.9	2.5%	4.3%

**The index for Seattle reflects prices in King, Pierce, and Snohomish Counties.*

Source: U.S. Department of Labor, Bureau of Labor Statistics

Nonagricultural Wage & Salary Workers in Washington State, Place of Work[1]

(In Thousands)

Industry	Sep 1989 (Prel)	Aug 1989 (Rev)	Sep 1988 (Rev)	Aug 1988 (Rev)	Numeric Change: Aug 1989 to Sep 1989	Numeric Change: Sep 1988 to Sep 1989
Total Nonagricultural Wage & Salary	2072.3	2048.1	1972.3	1945.0	24.2	100.0
Manufacturing	368.6	367.3	346.7	343.2	1.3	21.9
Durable Goods	262.9	262.8	244.7	242.5	0.1	18.2
Lumber & Wood Products	43.2	43.6	42.1[3]	41.1[3]	-0.4	1.1
Furniture & Fixtures	4.3	4.3	4.3	4.2	0.0	0.0
Stone, Clay & Glass	7.7	7.8	7.8	7.8	-0.1	-0.1
Primary Metals	13.3	13.4	13.2[3]	13.0[3]	-0.1	0.1
Aluminum	9.0	9.1	9.1	8.9	-0.1	-0.1
Fabricated Metals	11.7	11.6	11.4	11.3	0.1	0.3
Machinery	34.1	34.1	32.1	31.8	0.0	2.0
Machinery (Exc. Elec.)	19.5	19.7	18.4	18.2	-0.2	1.1
Electrical Equip	14.6	14.4	13.7	13.6	0.2	0.9
Transportation Equip	130.7	130.1	116.8	116.3	0.6	13.9
Aerospace	115.7	115.4	101.8	101.2	0.3	13.9
Other Transp. Equip	15.0	14.7	15.0	15.1	0.3	0.0
Instruments & Related	11.9	11.9	11.5	11.6	0.0	0.4
Misc. Manufacturing	6.0	6.0	5.5	5.4	0.0	0.5
Nondurable Goods	105.7	104.5	102.0	100.7	1.2	3.7
Food & Kindred Products	38.7	37.6	37.1	35.5	1.1	1.6
Canned & Preserved Foods	17.1	15.6	15.7	14.3	1.5	1.4
Apparel & Allied Products	6.4	6.3	6.2	6.3	0.1	0.2
Paper & Allied Products	17.6	17.7	17.3	17.5	-0.1	0.3
Printing & Publishing	22.4	22.2	21.7	21.6	0.2	0.7
Chemicals & Allied Products	10.4	10.4	10.1	10.2	0.0	0.3
Other Nondurable Goods[2]	10.2	10.3	9.6	9.6	-0.1	0.6
Mining & Quarrying	3.6	3.6	3.5	3.4	0.0	0.1
Construction	115.8	115.8	105.1	104.9	0.0	10.7
Transp., Comm. & Util	108.7	108.3	104.4	103.8	0.4	4.3
Wholesale & Retail Trade	508.0	511.4	487.1	484.2	-3.4	20.9
Wholesale Trade	124.5	122.7	120.0	117.5	1.8	4.5
Retail Trade	383.5	388.7	367.1	366.7	-5.2	16.4
Fin. Ins. & Real Estate	116.2	116.5	111.1	111.4	-0.3	5.1
Services	480.0	474.2[3]	453.4	448.7	5.8	26.6
Health Services	139.6	139.2[3]	134.6	134.4	0.4	5.0
Government	371.4	351.0	361.0	345.4	20.4	10.4
Federal	73.8	74.2	72.3	73.0	-0.4	1.5
State & Local	297.6	276.8	288.7	272.4	20.8	8.9
Education	148.9	124.5	143.9	123.0	24.4	5.0
Workers in Labor-Management Disputes	0.0	1.3	0.5	2.5	-1.3	-0.5

[1]Excludes proprietors, self-employed, members of armed forces, and private household employees. Includes all full- and part-time wage and salary workers receiving pay during the pay period including the 12th of the month.

[2]Includes textile mill products, rubber and miscellaneous plastic products, petroleum refining and related products, and leather products.

[3]Workers excluded because of involvement in labor-management disputes.

Washington State
Employment Security Department
Labor Market and Economic Analysis

Resident Labor Force and Employment in Washington State and Labor Market Areas

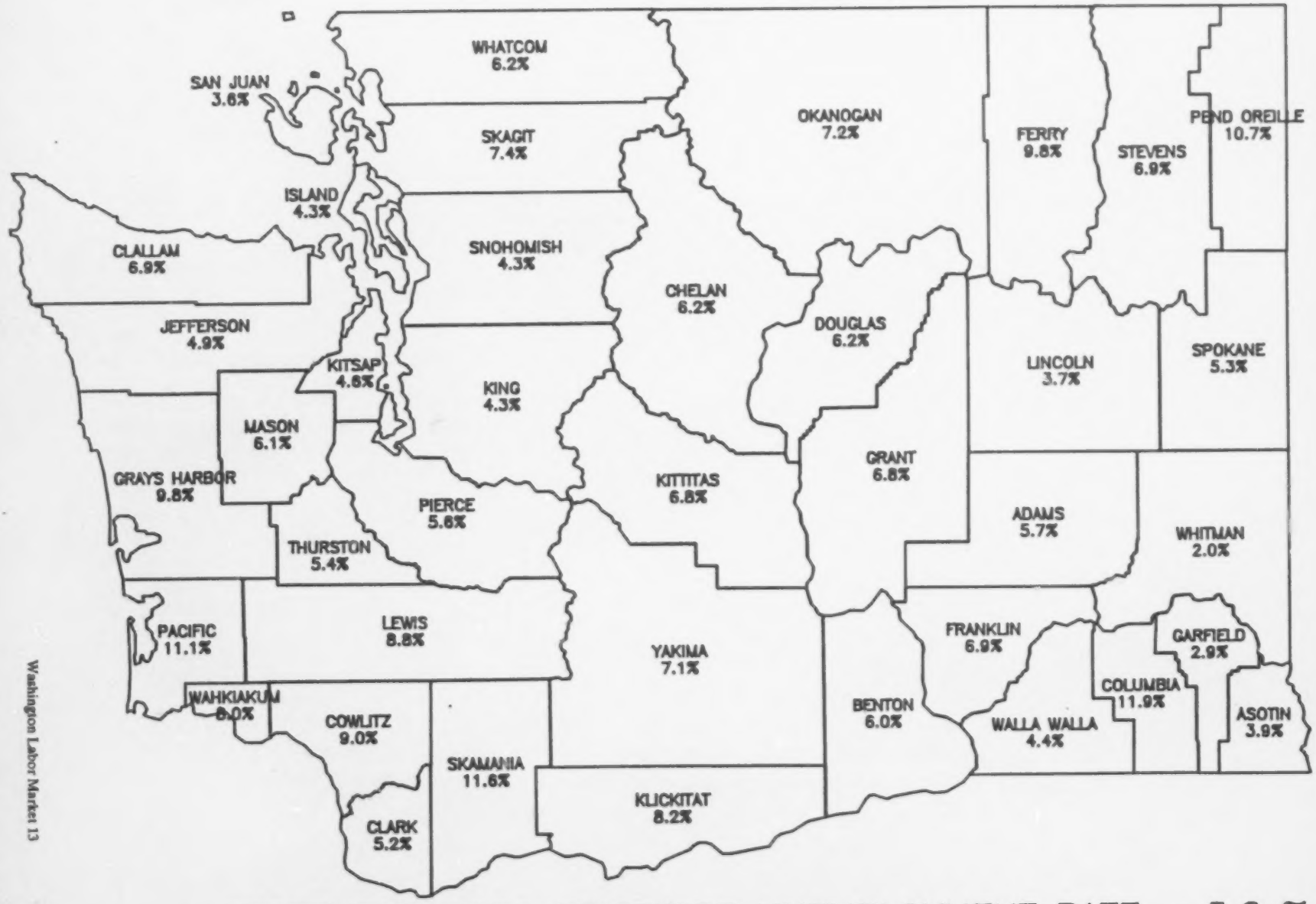
(Not Seasonally Adjusted)

Date: 11/1/89
Benchmark: 1988

Washington Labor Market 12

	September 1989 Preliminary[1]				August 1989 Preliminary[1]				September 1988 Revised[1]			
	Labor Force	Employ-ment	Unem-ployment	Unemp. Rate	Labor Force	Employ-ment	Unem-ployment	Unemp. Rate	Labor Force	Employ-ment	Unem-ployment	Unemp. Rate
Washington State Total	2,382,300	2,257,400	124,900	5.2	2,425,800	2,294,300	131,500	5.4	2,312,000	2,180,300	131,700	5.7
Bellingham MSA	58,500	54,900	3,600	6.2	60,900	57,500	3,400	5.6	57,600	54,000	3,600	6.3
Bremerton MSA	75,900	72,400	3,500	4.6	77,300	73,700	3,600	4.7	75,400	71,500	3,900	5.2
Olympia MSA	76,600	72,500	4,100	5.4	78,000	74,000	4,000	5.1	75,000	70,300	4,700	6.3
Seattle PMSA	1,071,700	1,025,300	46,400	4.3	1,096,200	1,050,700	45,500	4.2	1,020,000	973,400	46,600	4.6
King County[2]	848,700	811,800	36,900	4.3	868,300	832,000	36,300	4.2	806,700	770,700	36,000	4.5
Snohomish County[2]	223,000	213,500	9,500	4.3	228,000	218,800	9,200	4.0	213,300	202,700	10,600	5.0
Spokane MSA	164,600	155,900	8,700	5.3	169,000	160,000	9,000	5.3	165,800	156,800	9,000	5.4
Tacoma PMSA	249,500	235,500	14,000	5.6	250,500	236,400	14,100	5.6	243,500	229,100	14,400	5.9
Tri-Cities MSA	69,300	65,000	4,300	6.2	70,100	64,700	5,400	7.7	68,100	63,300	4,800	7.0
Benton County[2]	53,400	50,200	3,200	6.0	53,600	50,000	3,600	6.7	52,400	48,900	3,500	6.7
Franklin County[2]	15,900	14,800	1,100	6.9	16,600	14,700	1,900	11.4	15,700	14,400	1,300	8.3
Vancouver PMSA	118,300	112,100	6,200	5.2	121,700	115,100	6,600	5.4	115,400	109,500	5,900	5.1
Yakima MSA	100,300	93,200	7,100	7.1	99,900	90,000	9,900	9.9	99,700	92,500	7,200	7.2
Adams	7,400	6,980	420	5.7	7,180	6,590	590	8.2	7,380	6,900	480	6.5
Asotin	9,540	9,170	370	3.9	9,770	9,410	360	3.7	9,250	8,840	410	4.4
Clallam	22,610	21,050	1,560	6.9	23,130	21,400	1,730	7.5	23,230	20,720	2,510	10.8
Columbia	1,510	1,330	180	11.9	1,600	1,410	190	11.9	1,570	1,350	220	14.0
Cowlitz	34,970	31,830	3,140	9.0	36,270	33,590	2,680	7.4	35,200	32,090	3,110	8.8
Ferry	3,070	2,770	300	9.8	3,250	2,940	310	9.5	2,930	2,610	320	10.9
Garfield	1,040	1,010	30	2.9	1,100	1,080	20	1.8	1,070	1,030	40	3.7
Grant	27,120	25,280	1,840	6.8	26,650	23,920	2,730	10.2	26,440	24,280	2,160	8.2
Grays Harbor	25,230	22,760	2,470	9.8	25,430	23,110	2,320	9.1	25,990	22,680	3,310	12.7
Island	20,210	19,340	870	4.3	21,000	20,140	860	4.1	19,420	18,630	790	4.1
Jefferson	8,530	8,110	420	4.9	8,560	8,160	400	4.7	8,500	7,960	540	6.4
Kittitas	11,310	10,540	770	6.8	11,510	10,740	770	6.7	11,300	10,380	920	8.1
Klickitat	8,200	7,530	670	8.2	8,560	7,600	960	11.2	7,920	7,050	870	11.0
Lewis	25,070	22,870	2,200	8.8	25,390	23,700	1,690	6.7	25,530	22,550	2,980	11.7
Lincoln	4,070	3,920	150	3.7	4,640	4,490	150	3.2	4,440	4,280	160	3.6
Mason	15,530	14,580	950	6.1	15,440	14,520	920	6.0	12,400	11,390	1,010	8.1
Okanogan	17,360	16,110	1,250	7.2	15,610	13,700	1,910	12.2	16,960	15,490	1,470	8.7
Pacific	7,400	6,580	820	11.1	7,900	7,220	680	8.6	7,350	6,430	920	12.5
Pend Oreille	3,450	3,080	370	10.7	3,610	3,240	370	10.2	3,550	3,130	420	11.8
San Juan	5,900	5,690	210	3.6	6,610	6,470	140	2.1	5,750	5,570	180	3.1
Skagit	35,070	32,490	2,580	7.4	37,280	34,890	2,390	6.4	33,120	30,560	2,560	7.7
Skamania	2,490	2,200	290	11.6	2,550	2,230	320	12.5	2,320	1,910	410	17.7
Stevens	12,240	11,390	850	6.9	12,540	11,650	890	7.1	12,080	11,050	1,030	8.5
Wahkiakum	1,130	1,040	90	8.0	1,280	1,200	80	6.3	1,220	1,020	200	16.4
Walla Walla	23,570	22,530	1,040	4.4	23,810	22,620	1,190	5.0	23,670	22,470	1,200	5.1
Wenatchee Labor Area	43,650	40,940	2,710	6.2	42,730	37,880	4,850	11.4	43,910	40,990	2,920	6.6
Chelan County[2]	29,240	27,420	1,820	6.2	28,730	25,360	3,370	11.7	29,640	27,450	2,190	7.4
Douglas County[2]	14,420	13,530	890	6.2	13,990	12,510	1,480	10.6	14,270	13,540	730	5.1
Whitman	19,780	19,390	390	2.0	18,840	18,440	400	2.1	18,910	18,490	420	2.2

[1]Official U.S. Department of Labor, Bureau of Labor Statistics data.
[2]Estimates are determined by using the Population/Claims Share disaggregation methodology.
Note: Detail may not add due to rounding.



SEPTEMBER 1989 STATEWIDE UNEMPLOYMENT RATE = 5.2 %

Washington Labor Market 13

Estimated Average Hours and Earnings of Production Workers in Manufacturing and of Nonsupervisory Workers in Nonmanufacturing Activities, State of Washington

	Prelim Sept. Production Workers & Nonsupervisory Workers	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
		Sep 89	Aug 89	Sep 88	Sep 89	Aug 89	Sep 88	Sep 89	Aug 89	Sep 88
TOTAL MANUFACTURING INDUSTRIES[1]	220,955	$495.96	$496.47	$474.00	39.9	40.2	39.5	$12.43	$12.35	$12.00
SELECTED MANUFACTURING INDUSTRIES										
Lumber and Wood Products	35,899	$427.11	$437.72	$380.66	37.4	38.6	34.7	$11.42	$11.34	$10.97
Primary Metal Industries	10,435	$534.52	$532.56	$545.69	41.5	42.0	42.9	$12.88	$12.68	$12.72
Fabricated Metal Products	9,745	$502.25	$481.96	$454.86	40.9	39.7	39.9	$12.28	$12.14	$11.40
Machinery	22,279	$388.26	$380.03	$383.13	39.1	38.7	40.5	$9.93	$9.82	$9.46
Food and Kindred Products	29,409	$366.52	$368.48	$339.59	38.5	37.6	37.4	$9.52	$9.80	$9.08
Chemical and Allied Products	4,070	$625.87	$613.37	$641.19	40.8	40.3	39.9	$15.34	$15.22	$16.07
Transportation Equipment	61,348	$632.18	$644.74	$627.10	42.6	43.8	43.7	$14.84	$14.72	$14.35
SELECTED NONMANUFACTURING INDUSTRIES										
Construction	87,006	$641.47	$624.54	$604.87	37.8	37.6	37.2	$16.97	$16.61	$16.26
Wholesale and Retail Trade (does not include eating and drinking establishments)	316,695	$334.62	$327.94	$314.20	33.8	33.6	32.9	$9.90	$9.76	$9.55

[1]Average hourly earnings for all manufacturing production workers reported in this table do not exactly reflect the official US Bureau of Labor Statistics definition of "wages." While these data still constitute a valid economic indicator series, they should not be used at this time for the negotiation of contracts whose monetary provisions may depend upon official US Bureau of Labor Statistics hourly earning data.